

September 2006

RE: EDEExpress for Windows 2006-2007, Release 3.0

Dear EDEExpress Users:

Federal Student Aid is pleased to announce the availability of EDEExpress for Windows 2006-2007, Release 3.0. Release 3.0 is the first of three planned EDEExpress 2006-2007 enhancement releases that implement provisions of the Higher Education Reconciliation Act of 2005 (the HERA), Pub. L. 109-171.

In addition to other changes, the HERA implemented two new Title IV grant programs—the Academic Competitiveness Grant (ACG) and the National Science and Mathematics Access to Retain Talent (National SMART) Grant. The HERA also extends Federal Direct PLUS Loan (Direct PLUS) eligibility to graduate or professional students.

Note: The HERA provides for eligible graduate and professional students to receive Direct PLUS Loans on or after July 1, 2006. The HERA provision does not create a new loan program, but rather, allows a new type of borrower—an eligible graduate or professional student—to borrow under the existing Direct PLUS Loan Program. In EDEExpress 2006-2007, Release 3.0 and forward, a Direct PLUS loan for a graduate or professional student is referred to as a “Grad PLUS” loan.

EDEExpress 2006-2007, Release 3.0, enables you to create ACG and National SMART Grant origination and disbursement records and updates Direct Loan functionality to uniquely identify Grad PLUS loan records on entry tabs, reports, and in other software features. Release 3.0 also enables you to import and print ACG and National SMART Grant versions of the Electronic Statement of Account (ESOA) and adds separate print options for the Grad PLUS MPN, List–Grad PLUS MPN, MPN Manifest, and Disclosure Statement.

Note: You will not be able to export ACG or National SMART Grant records for transmission to the COD System or import responses for ACG and National SMART Grant data sent by the COD System until you install EDEExpress 2006-2007, Release 4.0 (available December 2006). In addition, the COD System will not accept ACG or National SMART Grant origination or disbursement data until December 16, 2006.

Other changes related to the HERA, including updates to ISIR comment code text and existing Pell functionality, are also implemented in Release 3.0.

This letter includes the following information:

- A list of enhancements to the EDEExpress Global, Application Processing, Pell, and Direct Loan modules related to the HERA
- Reminders on backing up and optimizing your EDEExpress database

Additional changes related to the HERA will be implemented in EDEExpress 2006-2007, Release 4.0 (available December 2006) and Release 5.0 (available April 2007).

For more information on Release 3.0 enhancements and upcoming EDEExpress 2006-2007 releases, see the section “Overview of EDEExpress Updates to Implement the HERA” later in this letter.

How to Get EDEExpress and Documentation

You can download Release 3.0 and related user documentation from the U.S. Department of Education’s Federal Student Aid Download Web site, located at fsadownload.ed.gov.

Instructions for downloading EDEExpress are located in the “Downloading Documentation and Software from the FSAdownload Web Site” section of the *2006-2007 Installation Guide for EDEExpress for Windows* at fsadownload.ed.gov/softexpress0607.htm.

If you have trouble opening the FSAdownload Web site, contact CPS/SAIG Technical Support at **800/330-5947 (TDD/TTY 800/511-5806)** or by e-mail at CPSSAIG@ed.gov.

Note: Some organizations restrict their users from downloading programs from Internet sites. If you have trouble downloading, contact your technical support staff to ensure that you have full download rights.

If You Have Technical Support Questions

If you have questions regarding EDEExpress, such as installation issues, software problem resolution, or software functionality, or if you need technical assistance, contact CPS/SAIG Technical Support.

You can reach CPS/SAIG Technical Support Monday through Friday, 7 a.m. – 7 p.m. (CT), at **800/330-5947 (TDD/TTY 800/511-5806)**. You can also send e-mail inquiries, comments, or suggestions to CPSSAIG@ed.gov. A representative will respond within 24 business hours.

You can also post questions regarding EDEExpress on our e-mail listserv, FSATECH. FSATECH is an e-mail listserv for technical questions about the U.S. Department of Education’s Federal Student Aid systems, software, and mainframe products.

Note: Make sure you include your telephone number in your message in case we need additional information. We will research your question and post our response to the listserv so that everyone can benefit from the information.

For more information about FSATECH, including how to subscribe, go to fsa4schools.ed.gov, click “Listservs/Mailing Lists” on the left menu, and click the “FSATech” link.

If You Have Common Origination and Disbursement (COD) System Questions

If you have questions regarding the COD System, or if student or parent borrowers have questions regarding Direct Loan PLUS and Grad PLUS loans, contact the COD School Relations Center at CODsupport@acs-inc.com or at the numbers listed below for assistance:

- Pell Grant, ACG, and National SMART Grant: 800/474-7268 (800/4PGRANT)
- Direct Loan School Services: 800/848-0978
- Direct Loan Applicant Services: 800/557-7394 (for student and parent borrowers)

If You Have Other Questions Regarding the HERA

If you have other questions regarding the HERA, contact the Federal Research and Customer Care Center (RCCC) at 800/433-7327 or 202/275-5532 (fax). You can also e-mail the RCCC at fsa.customer.support@ed.gov. Hours are 9 a.m. to 5 p.m. ET, Monday through Friday, excluding federal holidays.

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Overview of EDEXpress 2006-2007 Updates for the HERA

The Higher Education Reconciliation Act of 2005 (the HERA), Pub. L. 109-171, created two new Title IV grant programs—the Academic Competitiveness Grant (ACG) and the National Science and Mathematics Access to Retain Talent (National SMART) Grant. The HERA also extends Federal Direct PLUS Loan (Direct PLUS) eligibility to graduate or professional students. In EDEXpress 2006-2007, Release 3.0 and forward, a Direct PLUS loan for a graduate or professional student is referred to as a “Grad PLUS” loan.

EDEXpress 2006-2007, Release 3.0 enables you to create ACG and National SMART Grant origination and disbursement records and updates Direct Loan functionality to uniquely identify Grad PLUS loan records on entry tabs, reports, and in other software features. Release 3.0 also enables you to import and print ACG and National SMART Grant versions of the Electronic Statement of Account (ESOA) and adds separate print options for the Grad PLUS MPN, List–Grad PLUS MPN, MPN Manifest, and Disclosure Statement. Other changes related to the HERA, including updates to ISIR comment code text and existing Pell functionality, are also implemented in Release 3.0.

EDEXpress 2006-2007 will be modified in two upcoming releases (Release 4.0 and Release 5.0) to further enhance ACG, National SMART Grant, and Grad PLUS functionality:

- **EDEXpress 2006-2007, Release 4.0**, available December 2006, will enable you to export ACG and National SMART Grant origination and disbursement records for transmission to the Common Origination and Disbursement (COD) System and to import responses from the COD System.

Note: While Release 3.0 will allow you to create ACG and National SMART Grant origination and disbursement records, you will not be able to export ACG or National SMART Grant records from EDEXpress 2006-2007 for transmission to the COD System or import responses for ACG and National SMART Grant data sent by the COD System until you install Release 4.0. In addition, the COD System will not accept ACG or National SMART Grant origination or disbursement data until December 16, 2006.

- **EDEXpress 2006-2007, Release 5.0**, available April 2007, will enable you to export ACG and National SMART Grant Data Requests to the COD System and import ACG and National SMART Grant-specific versions of files such as the Year-to-Date (YTD) and Multiple Reporting Record (MRR).
 - EDEXpress 2006-2007, Release 5.0 will also update Direct Loan functionality, including the origination process, to follow increased annual loan limits established for Direct Subsidized and Direct Unsubsidized loan awards by the HERA. For more information on the HERA’s annual loan limit changes for the Direct Stafford Loan Program, see [Dear Colleague Letter GEN-06-02](#), posted on the Information for Financial Aid Professionals (IFAP) Web site, located at ifap.ed.gov, on March 10, 2006.

Note: The COD System will not accept subsidized or unsubsidized loan originations at the higher loan limits if the origination date is prior to July 1, 2007.

- The EDEExpress Package/Repackage process will not be modified to award subsidized (Aid Type S) or unsubsidized (Aid Type U) loans at the new loan limits until EDEExpress 2007-2008, Release 1.0. EDEExpress 2006-2007 Packaging users can increase subsidized and unsubsidized awards manually to the new limits on Packaging records at any time. However, the higher loan limits cannot be originated prior to July 1, 2007 in the Direct Loan module. Users may need to create an additional loan origination record for the student.

For more information on enhancements to Application Processing, Packaging, Pell, Direct Loan, and Global functionality related to the HERA, see the September 2006 addenda to the *EDEExpress for Windows 2006-2007, Release 1.0 Desk Reference* and the *EDEExpress for Windows 2006-2007, Release 2.0 Desk Reference*. Both documents are available on the FSAdownload Web site at fsadownload.ed.gov/softexpress0607.htm.

EDEExpress for Windows 2006-2007, Release 3.0

EDEExpress for Windows 2006-2007, Release 3.0 can be installed as an upgrade to Release 1.0 or Release 2.0. You must have Release 1.0 or Release 2.0 installed to run an upgrade (or “custom”) installation.

Reminder: Before upgrading to Release 3.0, ensure you have a valid, reliable backup copy of your current production 2006-2007 EDEExpress database (expres67.mdb).

To upgrade to Release 3.0, select either the Stand Alone Custom or Workstation Custom option during installation, depending on your EDEExpress operating environment.

If you have not installed Release 1.0 or Release 2.0 on your system, you can proceed directly to a Stand Alone Full or Network Server/Workstation Full installation of Release 3.0. Be aware, however, that a Stand Alone Full or Network Server/Workstation Full installation will load a completely new, blank 2006-2007 EDEExpress database to your system. If a database already exists for 2006-2007 on your system, a full installation of Release 3.0 will overwrite it and all data previously entered will be lost.

For more information on the EDEExpress installation process, see the *2006-2007 Installation Guide for EDEExpress for Windows*, which is available for download from the FSAdownload Web site at fsadownload.ed.gov/softexpress0607.htm.

Database Update Process for PLUS Records for Graduate or Professional Students

In August 2006, Federal Student Aid posted two EDEExpress 2006-2007 two program files that, when copied to the EDEExpress program directory, updated data edits in the Direct Loan module to allow the creation of PLUS loan records for independent students with a college grade level equal to or greater than 6 (1st year graduate/professional).

If you loaded the two program files included in the August 2006 release and subsequently created PLUS loan records for graduate or professional students in EDEExpress, a database update process that runs following the installation of Release 3.0 will modify PLUS loan records with a college grade level equal to or greater than **6** to be uniquely identified as PLUS loan records for graduate or professional students (or “Grad PLUS” records) within EDEExpress functionality.

Note: Due to the availability of enhanced Grad PLUS functionality in EDEExpress 2006-2007, Release 3.0, the August 2006 release has been removed from the FSAdownload Web site.

Release 3.0 Enhancements

Listed below are the enhancements implemented in EDEExpress 2006-2007, Release 3.0, by module:

Global Enhancements

The following enhancements to Global functionality (applicable to all EDEExpress releases) are available in Release 3.0:

- **Import ACG Data File Using ED-Initiated Import:** The ACG Data File (message class **ED2007OP**) can be imported and printed using the EDEExpress Global ED-initiated Import function. The ACG Data File contains ACG student self-certification data entered on FAFSA on the Web (FOTW), which you can use as part of eligibility determination and validation procedures. You must define the message class (in **Tools, Setup, Global, ED Initiated Imports**) before you can import the ACG Data File. The report is print-only, and the data is not stored in the EDEExpress database. A record layout for the ACG Data File is available in Section 3 of the latest version of the *2006-2007 Electronic Data Exchange (EDE) Technical Reference*, available on the FSAdownload Web site, located at fsadownload.ed.gov.

Note: ACG-related comment codes may not always appear on the ISIR for ACG-eligible students. Be sure to check ACG Data Files for additional ACG eligibility information.

- **Help Topics Added for ACG, National SMART Grant, Grad PLUS, and “Other HERA Changes”:** Four new help topics are available in online help that provide detailed information and guidance on EDEExpress changes related to the HERA. The topics are titled “Academic Competitiveness Grant (ACG),” “National Science and Mathematics Access to Retain Talent (SMART) Grant,” “Graduate and Professional Student PLUS Loan (Grad PLUS),” and “Other HERA Changes Overview.” The topics can be accessed by clicking **Help, Help Topics** from the EDEExpress menu bar, selecting the **Index** tab, and typing the name of the topic you want to view.

Application Processing Enhancements

The following enhancements to the Application Processing module are available in Release 3.0:

- **ISIR Data Import Dialog Box Updated with New ACG ISIR Message Class:** The CPS added a new 2006-2007 ISIR message class (**IGAA07OP**) for pushed ISIRs resulting from students self-certifying their potential ACG eligibility on FOTW. When you click the **File** button on the EDEExpress ISIR Data Import dialog box to select an ISIR file to import, ISIR files sent under the IGAA07OP message class are now displayed automatically along with files sent under other 2006-2007 ISIR message classes. To modify the default import directory for IGAA07OP files, go to **Tools, Setup, Global, File Management, Imports**.
- **New SAR Comment Codes and Text Added:** As a result of the HERA, the Central Processing System (CPS) added six new SAR comment codes (119, 267, 268, 269, 270, and 271). Comment code 119 is assigned to applicants currently serving on active duty in the U.S. Armed Forces for purposes other than training, now considered to be independent students. Comment code 267 alerts students to potential ACG eligibility. Comment codes 268-271 correspond to student responses submitted during the ACG self-certification process on FOTW. All new comment codes and associated text are included in Release 3.0 and print as part of the ISIR if present on the transaction. The new comment code numbers are also displayed on the ISIR Review tab and on the List-Processed ISIRs report.

Note: To view the most recent updates to 2006-2007 comment codes and text, see the latest version of the *2006-2007 SAR Comment Codes and Text*, available in the “Technical References and Guides” section of the FSAdownload Web site, located at fsadownload.ed.gov.
- **Addition of ACG Pre-Defined Query:** To help identify students who may be ACG-eligible, we added a predefined query to filter for ISIR transactions with SAR comment code 271. When a student successfully completes the ACG self-certification process on FOTW, the CPS generates a new 2006-2007 ISIR transaction for the student with SAR comment code 271.

Pell Enhancements

Pell Setup

The following enhancement to Pell School setup (**Tools, Setup, COD, School, Pell Payments**) is available in Release 3.0:

- **Minimum Valid Value for Weeks of Instructional Time in a Program's Definition of Academic Year Decreased to 26 for Clock-Hour Programs:** Schools calculating Pell awards using Payment Methodology 4 for clock-hour programs can now enter a minimum value of 26 (instead of the prior minimum value of 30) for the Pell School setup field Weeks of Instructional Time in Program's Definition of Academic Year. Schools using Payment Methodology 4 for credit-hour programs without terms continue to use a minimum value of 30.

Note: The valid value range for Weeks of Instructional Time in a Program's Definition of Academic Year remains at 30-78 for Payment Methodology 2 (standard term credit hour program < 30 weeks), 3 (any term-based credit-hour program), and 5 (correspondence study program without terms).

Pell Entry

The following enhancements to the Pell module's entry functionality are available in Release 3.0:

- **Pell Tabs Updated for ACG and National SMART Grant Origination/Disbursement Entry:** The Pell Origination and Pell Disburse tabs are updated to allow entry of origination and disbursement data for ACG and National SMART Grant award data. You must now select the appropriate Grant Type (Pell, ACG, or National SMART) when adding a new record on the Pell Origination tab by clicking the plus (+) sign on the toolbar or selecting **Record, Add**. The Pell Disburse tab now displays the Grant Type for the record selected.
- **ACG and National SMART Grant Origination Entry Fields Added:** The entry fields displayed on the Pell Origination tab now differ, depending on the type of origination record created. If you create an ACG record, the Pell Origination tab displays two new fields specific to the ACG, Eligibility/Payment Reason and High School Program Code. If you create a National SMART Grant record, the Pell Origination tab displays one new field, CIP Code, which is specific to the National SMART Grant. The student's College Year is also required for both ACG and National SMART Grant records.

Note: Origination entry fields required only for Pell origination records will not display on the Pell Origination tab for ACG or National SMART Grant origination records.

- **ACG and National SMART Grant Multiple Entry Added:** Multiple Entry enables you to modify various ACG or National SMART Grant origination fields for more than one student at one time. You can update each field with the information you want changed on all of the records and then specify the group of records by using selection criteria, by entering Social Security Numbers (SSNs), or by importing an SSN file. Select **Process, Multiple Entry, ACG** or **Process, Multiple Entry, National SMART** to access the ACG or National SMART Grant Multiple Entry dialog box, respectively.
- **Pell Origination Tab and Multiple Entry Updated for New Minimum Valid Value for Weeks of Instructional Time in a Program's Definition of Academic Year for Clock-Hour Programs:** Schools calculating Pell awards using Payment Methodology 4 for clock-hour programs can now enter a minimum value of 26 (instead of the prior minimum value of 30) for the field Weeks of Instructional Time in a Program's Definition of Academic Year on the Pell Origination tab. Pell Multiple Entry has also been updated to allow this new minimum value. Schools using Payment Methodology 4 for credit-hour programs without terms continue to use a minimum value of 30.

Pell Import

The following enhancements to the Pell module's import functionality are available in Release 3.0:

- **Pell ISIR Import Updated for ACG and National SMART Grant:** Pell-eligible ISIRs can be imported into the Pell module (**File, Import, Pell, Origination Data-ISIRs**) and used as a starting point for creating ACG and National SMART Grant origination records. You must now specify Pell, ACG, or National SMART as the Grant Type on the Origination Data-ISIRs Import dialog box.

Note: Not all Pell recipients are eligible for an ACG or National SMART Grant.

- **Pell External Imports Updated for the ACG and National SMART Grant:** Release 3.0 adds the ability to create ACG and National SMART Grant origination and disbursement records using Pell external import functionality. You must follow the record layouts provided in the latest version of Volume III of the *2006-2007 COD Technical Reference*. Data elements and valid field content were added to or modified in the existing Pell External record layouts so that minimal changes would be required by schools already using the 2006-2007 record layout for Pell processing purposes.
- **Pell External Imports Updated for New Minimum Valid Value for Weeks of Instructional Time in a Program's Definition of Academic Year for Clock-Hour Programs:** Schools calculating Pell awards using Payment Methodology 4 for clock-hour programs can now provide a minimum value of 26 (instead of the prior minimum value of 30) for the field Weeks of Instructional Time in a Program's Definition of Academic Year in Pell External Origination Add/Change import files. Schools using Payment Methodology 4 for credit-hour programs without terms continue to use a minimum value of 30. For more information, see the latest version of Volume III of the *2006-2007 COD Technical Reference*.

- **ACG and National SMART Grant Versions of Electronic Statement of Account (ESOA) Added to Pell Import:** Release 3.0 enables you to import and print ACG and National SMART Grant versions of the ESOA generated by the COD System. Select **File, Import, Pell, Electronic Statement of Account** to import and print ESOA reports for the ACG (message class **AGAS07OP**) or National SMART Grant (message class **SGAS07OP**).

Note: Unlike Pell ESOA data, ACG and National SMART Grant ESOA data is not stored in the EDEXpress 2006-2007 database. You must print the report generated when you import the ACG or National SMART Grant ESOA file.

Pell Print

The following enhancements to the Pell module's print functionality are available in Release 3.0:

- **New ACG and National SMART Grant Reports Available:** Release 3.0 adds ACG and National SMART Grant versions of the Origination Record, Origination List, and Disbursement List currently available for Pell. To print the ACG or National SMART Grant version of these reports, go to **File, Print, Pell**, select the report you want to print, and select ACG or National SMART as the Grant Type.

Other Pell Enhancements

The following additional enhancements to the Pell module are available in Release 3.0:

- **ACG and National SMART Grant Fields Added to Pell Query:** To create queries for ACG- and National SMART Grant-related fields on origination records (such as Eligibility/Payment Reason or CIP Code), use the Pell tab on the Queries dialog box (**Tools, Query, Pell**).
- **Pell Query Updated for New Minimum Valid Value for Weeks of Instructional Time in a Program's Definition of Academic Year for Clock-Hour Programs:** Schools can now query on the new minimum value of 26 (instead of the prior minimum value of 30) for the field Weeks of Instructional Time in Program's Definition of Academic Year for clock-hour programs.
- **ACG and National SMART Grant Fields Added to Pell File Formats and External Export:** The Pell module File Formats setup (**Tools, File Formats, Pell**) has been modified to enable selection of new ACG and National SMART Grant data elements (such as Eligibility/Payment Reason and CIP Code) and includes the fields in Pell External Export (**File, Export, Pell, External Export**).

- **Pell External Export Includes New Minimum Valid Value for Weeks of Instructional Time in a Program's Definition of Academic Year for Clock-Hour Programs:** The new minimum value of 26 (instead of the prior minimum value of 30) for the field Weeks of Instructional Time in a Program's Definition of Academic Year for clock-hour programs is included in a Pell External Export file, provided you choose the field as part of the Pell File Format you select for the export.
- **Pell Browse Tabs Display ACG and National SMART Grant Data:** ACG and National SMART Grant origination and disbursement data are now included with Pell data in the Pell Browse feature (**Tools, Browse, Pell**) under the Origination and Disbursement tabs.

Note: ACG and National SMART Grant origination and disbursement records can be distinguished from Pell records on Pell Browse tabs by the Award ID. Award IDs for ACG and National SMART Grant records are 2 bytes shorter than Pell Award IDs and contain an award type of **A** (for ACG) or **T** (for National SMART Grant) in the tenth position.

Direct Loan Enhancements

Direct Loan Entry

The following enhancements to the Direct Loan module's entry functionality are available in Release 3.0:

- **EDEExpress Grad PLUS Loan Records Uniquely Identified:** Beginning with Release 3.0, the EDEExpress Direct Loan module maintains an internal loan type identifier (**G**) unique to Grad PLUS loan records. This internal loan type identifier is used by EDEExpress to differentiate between PLUS and Grad PLUS data in various EDEExpress functionality.

Note: The Grad PLUS internal loan type identifier is not submitted to the COD System. EDEExpress uses the existing PLUS Loan Type (**P**) when creating the Grad PLUS Loan ID, conforming with the COD Common Record.

- **Direct Loan Origination Entry Tab Modified for Grad PLUS Records:** The Direct Loan Origination tab has been modified for Grad PLUS loan entry. To add a Grad PLUS origination record manually, open an existing demo record you have entered in EDEExpress, select the Origination (Direct Loan) tab, go to **Record, Add**, and select **G** (Grad PLUS) for the Loan Type in the Add Loan dialog box. Select your DL Code and a Disbursement Profile for the Grad PLUS loan, then click OK.

Note: Because the student is the borrower on a Grad PLUS loan, the PLUS Info tab that appears on the Origination tab is disabled for Grad PLUS loan records. The borrower information exported to the COD System for a Grad PLUS loan record is pulled from the Demo tab. Also, the Student Loan Default/Grant Overpayment field does not appear on the Origination tab for Grad PLUS loan records (because the student is the borrower for a Grad PLUS loan, you only need to provide the Borrower's Loan Default/Grant Overpayment field value).

- **Direct Loan Origination Edits Updated for Grad PLUS Records:** The fields required to originate a Grad PLUS loan are the same as for a PLUS loan with two exceptions: the College Grade Level must be **6** (1st year graduate/professional) or higher and the student's Citizenship Status must be provided on the Demo tab.

Note: While the CPS Trans # field is optional to originate a Grad PLUS loan in EDEExpress, a Grad PLUS borrower must have a valid ISIR on file at CPS. Entering the CPS Trans # enables you to document internally that a valid ISIR exists.

Direct Loan Import

The following enhancements to the Direct Loan module's import functionality are available in Release 3.0:

- **Direct Loan ISIR Import Updated to Add Grad PLUS Loan Type:** ISIRs can be imported into the Direct Loan module (**File, Import, Direct Loan, Loan Data–ISIR**) and used as a starting point for creating Grad PLUS origination records. When importing ISIR data to create Grad PLUS loans, select **G** for the Loan Type to Create field in the Import dialog box.
- **Direct Loan External Import Add Updated for Grad PLUS:** You can add Grad PLUS loan origination and disbursement records in Release 3.0 using Direct Loan External Import Loan Origination Add (DIEA07OP). Valid field content was expanded for existing Direct Loan External Import Loan Origination Add record layout fields to include Grad PLUS-specific data if applicable. Refer to the latest version of Volume III of the *2006-2007 COD Technical Reference* for the record layouts you must follow to add Grad PLUS records in Release 3.0.

Note: You can also modify Grad PLUS loan origination records and add or adjust Grad PLUS disbursement records using Direct Loan External Import Change (DIEC07OP) files. The Direct Loan External Import Change process functions the same for Grad PLUS records as for other loan types. Refer to the latest version of Volume III of the *2006-2007 COD Technical Reference* for the Direct Loan External Change record layout and Direct Loan External Import Change Field Numbers.

Direct Loan Print

The following enhancements to the Direct Loan module's print functionality are available in Release 3.0:

- **Separate MPN and MPN Manifest Print Options Added for Grad PLUS:** Beginning with Release 3.0, you can print Grad PLUS MPNs and MPN manifests separately from PLUS MPNs and MPN manifests by selecting **File, Print, Direct Loan**. The same MPN form is used for both PLUS and Grad PLUS loan records, although the two loan types must be sent to the COD System in separate MPN Manifests. As with PLUS loans, the Grad PLUS MPN ID uses **N** for the Loan Type.

- **Regenerate Updated to Include Grad PLUS MPN Manifests:** MPN Manifests containing Grad PLUS loans can be regenerated in EDEExpress in the same manner as other loan types by clicking **File, Print, Direct Loan** and selecting **Manifest Document Regeneration**.
- **Separate Disclosure Statement Print Option Added for Grad PLUS:** Beginning with Release 3.0, you can print Disclosure Statements for Grad PLUS loan records separately from Disclosure Statements for PLUS loan records by selecting **File, Print, Direct Loan**. As with a PLUS loan, you cannot print a Grad PLUS Disclosure Statement in EDEExpress unless the credit decision status is **A** (Credit approved), **C** (Credit overridden; new credit information provided), or **E** (Credit overridden; endorser OK).
- **List–Grad PLUS MPN Added as Direct Loan Report:** A new Direct Loan report, List–Grad PLUS MPN, is available in Release 3.0. This report displays Grad PLUS MPN data in a format similar to the existing List–PLUS MPN report.
- **Separate Grad PLUS Totals Section Added to List–Actual Disbursements:** The List–Actual Disbursement report now includes separate summary totals for PLUS loans and Grad PLUS loans, as well as combined PLUS/Grad PLUS totals.
- **Existing Direct Loan Reports Updated to Include Grad PLUS Data:** The following existing Direct Loan and EDEExpress COD reports now include data for Grad PLUS records: List–Anticipated Disbursements, List–Actual Disbursements, List–Loans, List–Status, Origination Record, and Student Summary.

Other Direct Loan Enhancements

The following additional enhancements to the Direct Loan module are available in Release 3.0:

- **Pre-defined Queries Added/Modified for Grad PLUS:** We added a Direct Loan pre-defined query titled “Grad PLUS Loans” in Release 3.0, which can be used as a filter for reports and other Direct Loan functionality. Also, the criteria for two existing pre-defined queries have been modified to add Grad PLUS as a filter. The pre-defined query titled “Loan Type” now also filters for Grad PLUS loans if you enter **G** as the Field Value in the Parameter Query Entry dialog box. The query titled “LAA Not Equal Endorser Amount” now filters for loans where the Loan Amount Approved is not equal to the Endorser Amount, the Loan Type is PLUS or Grad PLUS, and the Credit Decision equals **E** (Credit overridden; endorser OK).
- **Grad PLUS Records Included in External Export:** Grad PLUS records are now included in Direct Loan External Export files. Grad PLUS records are identified as Loan Type **G** (Grad PLUS) in the export file, provided you select the Loan Type field as part of the Direct Loan File Format you use for the export.

- **Grad PLUS Tab Added to Direct Loan Browse:** A separate Grad PLUS tab has been added to the Direct Loan Browse feature (**Tools, Browse, Direct Loan**). This new tab displays Grad PLUS loan origination data similarly to the existing Sub/Unsub and PLUS tabs. In addition, the Disbursements and Document Activity tabs now display disbursement and document processing information for Grad PLUS records (along with other loan types).

EExpress COD Report

The following enhancement to EExpress COD reports, which can be printed from the COD Print dialog box (**File, Print, COD**), is available in Release 3.0:

- **Grad PLUS Records Included on List–Student Records in Document Report:** The List–Student Records in Document Report now includes Grad PLUS records.

2006-2007 COD Technical Reference

Volume III (Direct Loan and Pell Combination System Supplement) of the *2006-2007 COD Technical Reference* has been updated to add information and guidance related to the HERA, including importing ACG, National SMART Grant, and Grad PLUS origination and disbursement data from an external system into the EExpress software (in addition to Pell and other Direct Loan loan types).

You can download the latest version of Volume III of the *2006-2007 COD Technical Reference* from the FSAdownload Web site, located at fsadownload.ed.gov.

Reminders

Back Up Your Database Regularly

You should back up your EExpress database file (expres67.mdb) regularly so you do not lose your data. We recommend that you back up your files after each major update to your database (for example, updating a large group of origination or disbursement records), or at least once a week. You should also back up your data before and after you run the software utilities as a precautionary measure.

EExpress does not include a backup utility. You must use your own backup system. Be sure to test your backup system regularly to verify that you can reliably restore your database.

Optimize Your Database with Software Utilities

EExpress contains utilities that enable you to optimize your database to prevent problems. We recommend that you run the Compact and Repair Database and Verify Database utilities at least once a week. Be sure to create a backup of your database before and after running these utilities.

Run the software utilities in the following order:

- Compact and Repair Database
- Verify Database
- Compact and Repair Database

Run the Compact and Repair Database Utility

The Compact and Repair Database utility resolves inconsistencies in record storage and improves the performance of the EDEExpress database (expres67.mdb). Running this utility at least once per week helps to prevent database problems.

Events such as a power outage or a Local Area Network (LAN) failure can corrupt your database if it occurs while EDEExpress is updating student records. If your system functions unpredictably (for example, you start getting database error messages), run the Compact and Repair Database utility.

Running the Compact and Repair Database utility on a regular basis can make your database significantly smaller and improve EDEExpress' performance. The utility reduces the size of your database by organizing and storing records more efficiently and by removing any records that have been flagged for deletion.

Warning: Before using the Compact and Repair Database utility, be sure you have space on your hard drive or LAN folder that is at least equal to three times the current size of the database.

Run the Verify Database Utility

Each student record in EDEExpress has multiple parts that are stored in different database tables. The Verify Database utility checks the integrity of relationships between these tables. If EDEExpress shuts down due to a program error or halts abnormally while you are processing data, links between various parts of a record may become damaged. Verify Database repairs these damaged links within the database.

You should always run the Compact and Repair Database utility before and after running the Verify Database utility. Running this utility at least once per week is recommended as part of your preventative maintenance routine.

Warning: Before using the Verify Database utility, ensure you have hard drive or LAN folder space available that is equal to at least three times the current size of your EDEExpress database.